

Job Aid: Record Learning**PBL Course: Record Learning Completion****Learning Needs Management Lab 17: Record a Learning Event for Item(s)****Scheduling Management Lab 9: Record a Learning Event for a Scheduled Offering****Prerequisite Courses**

- Administrator Introduction to Plateau Learning
- Introduction to Learning Needs Management
- Create Items

Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the Learning Event Recorder. Related terminology is provided.

Tasks

- A. Use Learning Event Recorder to Record Completion of Item
- B. Use Learning Event Recorder to Record Attendance at External Event
- C. Use Learning Event Recorder to Record Completion of Scheduled Offering
- D. View User Learning History tab

Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

Types of Learning

Item Based Events: Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.

External Events: A learning activity outside of the organization, such as a college course or a seminar, for which there is no Item record in Plateau Learning, may be recorded in a user's Learning History. This external event allows for a description and comment field to further identify the nature of the training.

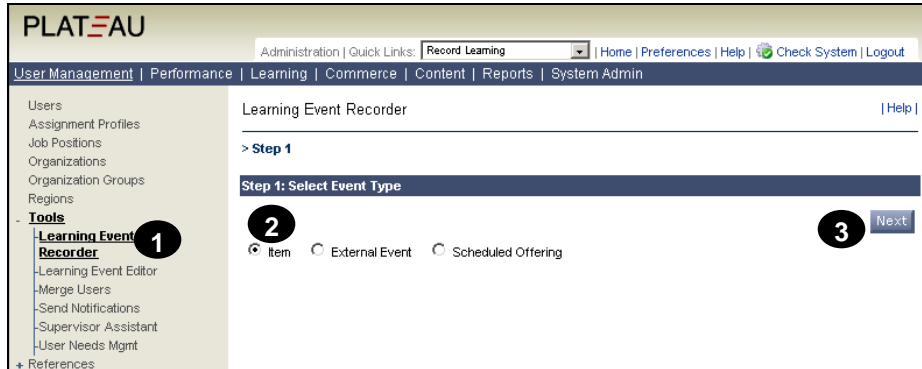
Scheduled Offering: An item or learning event with a scheduled date and time.

Task A: Use Learning Event Recorder to Record Completion of Item

- 1 Navigate to **User Management > Tools > Learning Event Recorder**.

Step 1: Select Event Type of the Learning Event Recorder wizard displays.


- 2 Select the **Item** option.
- 3 Click **Next**.



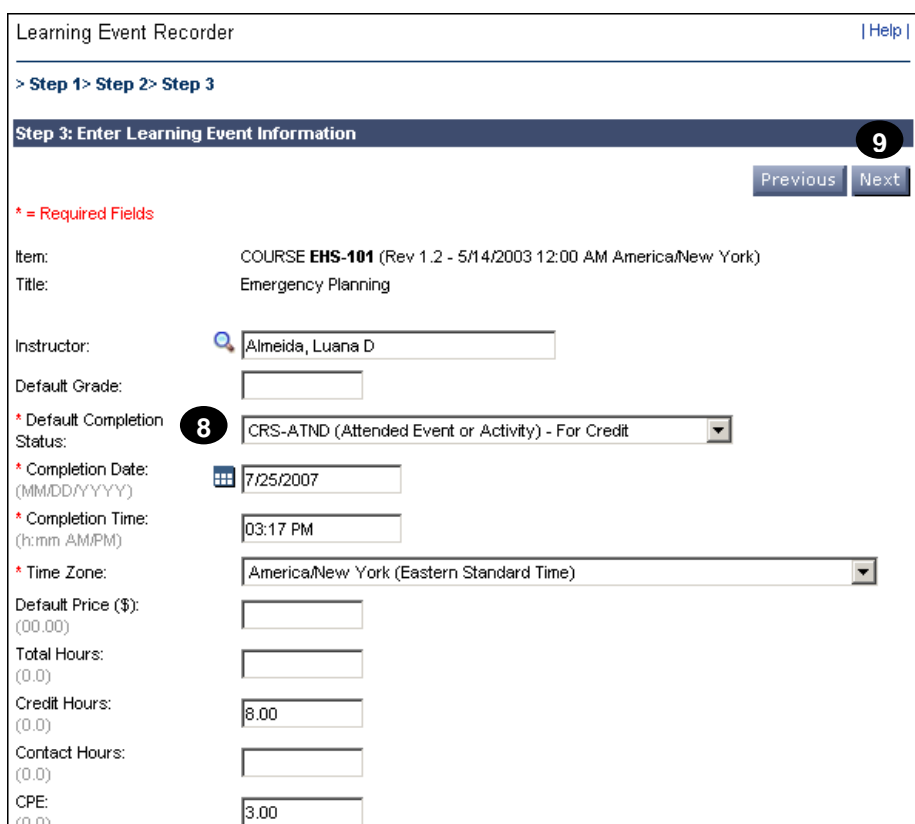

Note: This option is usually used when an item has not been scheduled or is classified as "Other."

Step 2: Select Item of the Learning Event Recorder wizard displays.

- 4 Select the item type from the drop-down menu.
- 5 Enter the Item ID in the textbox exactly.
- or
- 6 Click the **select icon** (🔍) to search for an item.
- 7 Click **Next**.



Note: By selecting to search for an item, all relevant information will be auto-populated into the fields.

<p>Step 3: Enter Learning Event Information of the Learning Event Recorder wizard displays.</p> <p>8 Fill in all of the required data fields (*) within the system.</p> <p>9 Click Next.</p>	
<p>Step 4: Select Users of the Learning Event Recorder wizard displays.</p> <p>10 Enter a User ID exactly.</p> <p>11 Click Add.</p> <p>or</p> <p>12 Click the add one or more from list link to search for and select one or more users.</p>	

13 Once all users have been added, confirm list.

14 Click **Next**.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4**

Step 4: Select Users **14**

[Previous](#) [Next](#)

* = Required Fields

Add Users

Enter User ID or [add one or more from list](#)

* User ID: [Add](#)

Edit Selected Users

[Apply Changes](#)

13 [Select All](#) / [Deselect All](#)

User ID	Name	Remove
SAMARCE	Arce, Sandy M	<input type="checkbox"/>
ELACLARK	Clark, Elizabeth A	<input type="checkbox"/>
ABKCLASSEN	Classen, Abigail K	<input type="checkbox"/>
CHNCLOHAN	Clohan, Christina N	<input type="checkbox"/>
CHCOFFMAN	Coffman, Christopher	<input type="checkbox"/>
CHLCOLEMAN	Coleman, Christina L	<input type="checkbox"/>
ANLCRAVER	Craver, Andrew L	<input type="checkbox"/>

Step 5: Edit User Event Information of the Learning Event Recorder wizard displays.

The status and grade selected at **Step 3: Enter Learning Event Information** are applied to all users.

15 Select an option in the drop-down menu to adjust a user's status.

16 Enter comments (optional).

17 Enter or adjust grade (optional).

18 Click **Next**.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5**

Step 5: Edit User Event Information **18**

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User	Comments	Grade	Status
SAMARCE (Arce, Sandy M)	<input type="text"/> Sandy did not s	<input type="text"/>	CRS-NS (No Show) - Not For Credit 15
ELACLARK (Clark, Elizabeth A)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit
ABKCLASSEN (Classen, Abigail K)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit
CHNCLOHAN (Clohan, Christina N)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit
CHCOFFMAN (Coffman, Christopher)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit
CHLCOLEMAN (Coleman, Christina L)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit
ANLCRAVER (Craver, Andrew L)	<input type="text"/>	A	CRS-ATND (Attended Event or Activity) - For Credit

Note: Any comments entered will appear on a Learning History report.

Step 6: Edit User Event Financial Information of the Learning Event Recorder wizard displays.

- 19** Enter any relevant financial information about the learning event.

Note: If there is no financial information to enter click **Next** to proceed.

- 20** Click **Next**.

Note: If you enter a price, you must also enter a cost center account code in order to proceed.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5** > **Step 6**

Step 6: Edit User Event Financial Information **20**

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For each User you may either enter the Price and Cost and Profit Centers or you may enter an order ticket.

User	Price (\$) (00.00)	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
SAMARCE (Arce, Sandy M)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				
ELACLARK (Clark, Elizabeth A)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				
ABKCLASSEN (Classen, Abigail K)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				
CHNCLOHAN (Cohan, Christina N)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				
CHCOFFMAN (Coffman, Christopher)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				
CHLCOLEMAN (Coleman, Christina L)	<input type="text"/>	<input type="text"/>		<input type="text"/>
Edit				

Step 7: Record Event of the Learning Event Recorder wizard displays.

- 21** If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.

- 22** Review learning event information.

- 23** Click **Finish**.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5** > **Step 6** > **Step 7**

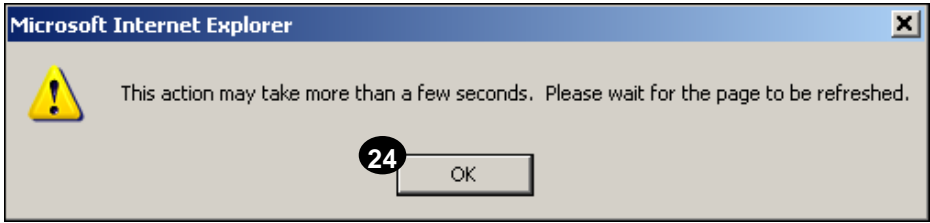
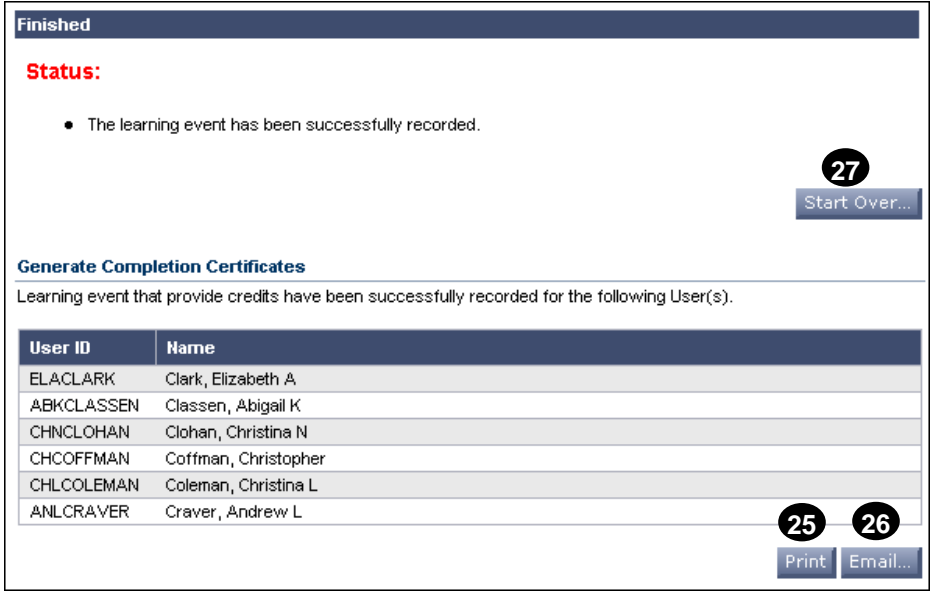
Step 7: Record Event **23**

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Item: COURSE **EHS-101** (Rev 1.2 - 5/14/2003 12:00 AM America/New York)
 Item Title: Emergency Planning
 Instructor: Almeida, Luana D
 Completion Date: 7/25/2007 03:17 PM America/New York
 Contact Hours: CPE: 3.00
 Total Hours: Default Tuition: 8.00
 Credit Hours: 8.00
 Automatically Assess Related Competencies: ☒ **21**

22

User	Status	Grade	Price (\$)	Cost Centers	Profit Centers	Order Ticket
SAMARCE (Arce, Sandy M)	CRS-NS (No Show)					
Comments: Sandy did not show up for class.						
ELACLARK (Clark, Elizabeth A)	CRS-ATND (Attended Event or Activity)	A				
Comments:						
ABKCLASSEN (Classen, Abigail K)	CRS-ATND (Attended Event or Activity)	A				
Comments:						

<p>A pop-up may appear requesting that the page refresh before you proceed.</p> <p>24 Click OK.</p>															
<p>The application provides a status to let you know that the learning event has been recorded successfully.</p> <p>25 Click Print to print a completion certificate report for each user listed.</p> <p>26 Click Email... to email a completion certificate report to each user listed.</p> <p>27 Click Start Over... to begin the Learning Event Recorder process again. This retains all users previously selected.</p>	 <p>Finished</p> <p>Status:</p> <ul style="list-style-type: none"> The learning event has been successfully recorded. <p>Generate Completion Certificates</p> <p>Learning event that provide credits have been successfully recorded for the following User(s).</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>ELACLARK</td> <td>Clark, Elizabeth A</td> </tr> <tr> <td>ABKCLASSEN</td> <td>Classen, Abigail K</td> </tr> <tr> <td>CHINCLOHAN</td> <td>Clohan, Christina N</td> </tr> <tr> <td>CHCOFFMAN</td> <td>Coffman, Christopher</td> </tr> <tr> <td>CHLCOLEMAN</td> <td>Coleman, Christina L</td> </tr> <tr> <td>ANLCRAVER</td> <td>Craver, Andrew L</td> </tr> </tbody> </table> <p>Note: The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.</p>	User ID	Name	ELACLARK	Clark, Elizabeth A	ABKCLASSEN	Classen, Abigail K	CHINCLOHAN	Clohan, Christina N	CHCOFFMAN	Coffman, Christopher	CHLCOLEMAN	Coleman, Christina L	ANLCRAVER	Craver, Andrew L
User ID	Name														
ELACLARK	Clark, Elizabeth A														
ABKCLASSEN	Classen, Abigail K														
CHINCLOHAN	Clohan, Christina N														
CHCOFFMAN	Coffman, Christopher														
CHLCOLEMAN	Coleman, Christina L														
ANLCRAVER	Craver, Andrew L														

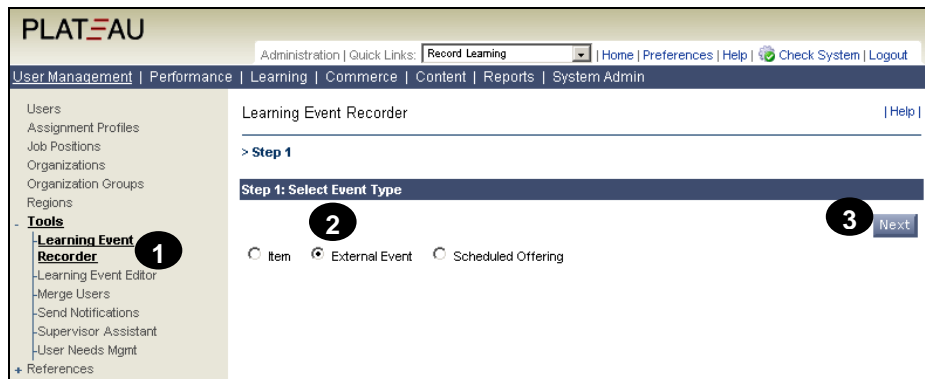
Task B: Use Learning Event Recorder to Record Attendance at External Event

- 1 Navigate to **User Management > Tools > Learning Event Recorder**.

Step 1: Select Event Type of the Learning Event Recorder wizard displays.

- 2 Select the **External Event** option.

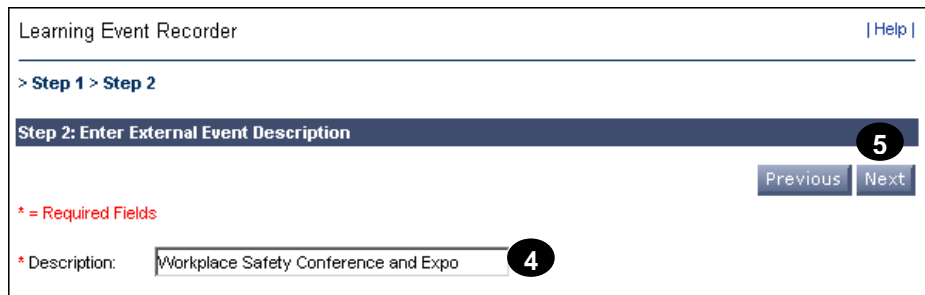
- 3 Click **Next**.



Note: This option is usually used to record completion or attendance for an event that is not represented as an item in Plateau Learning.

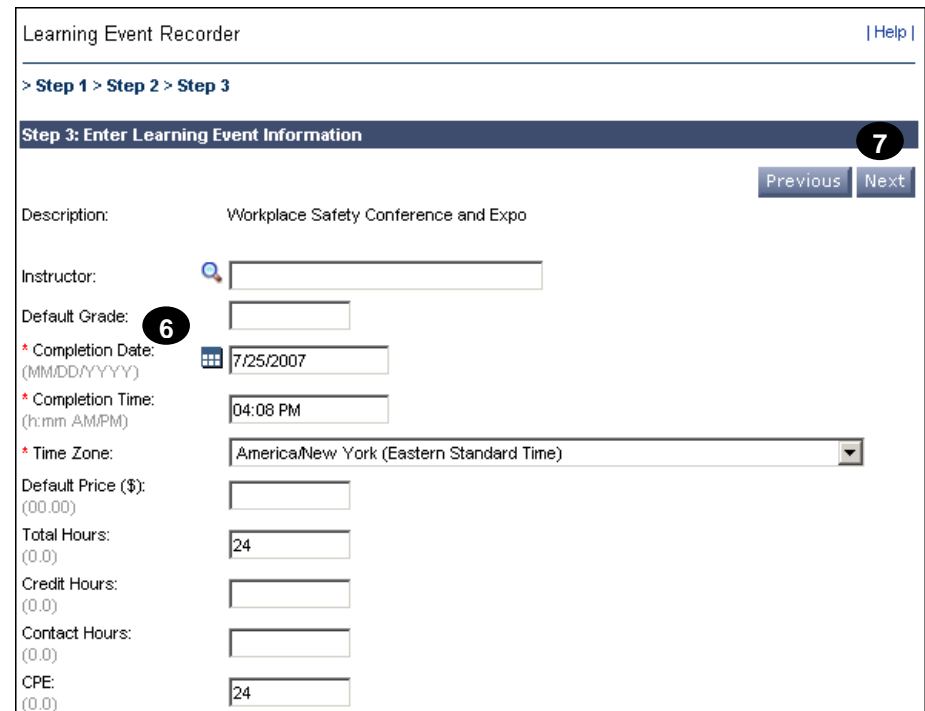
- 4 Enter a description of the external event.

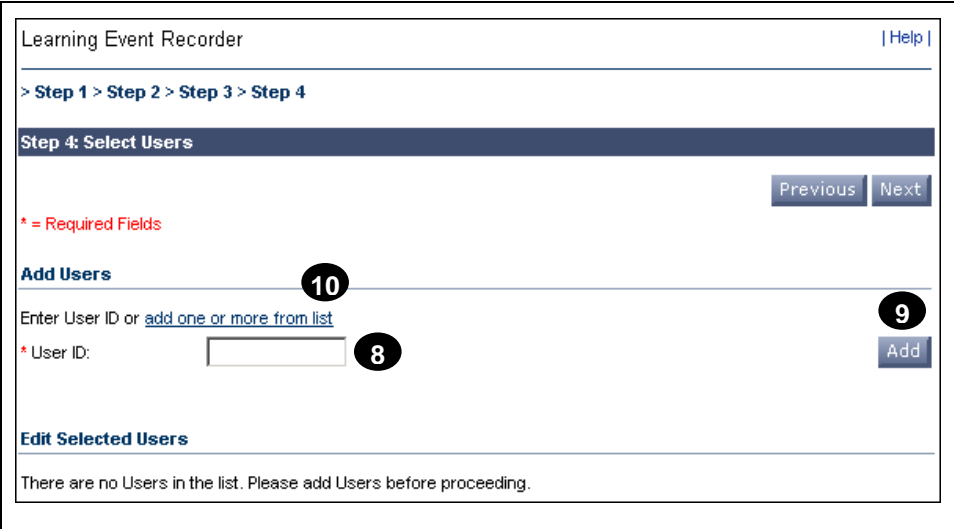

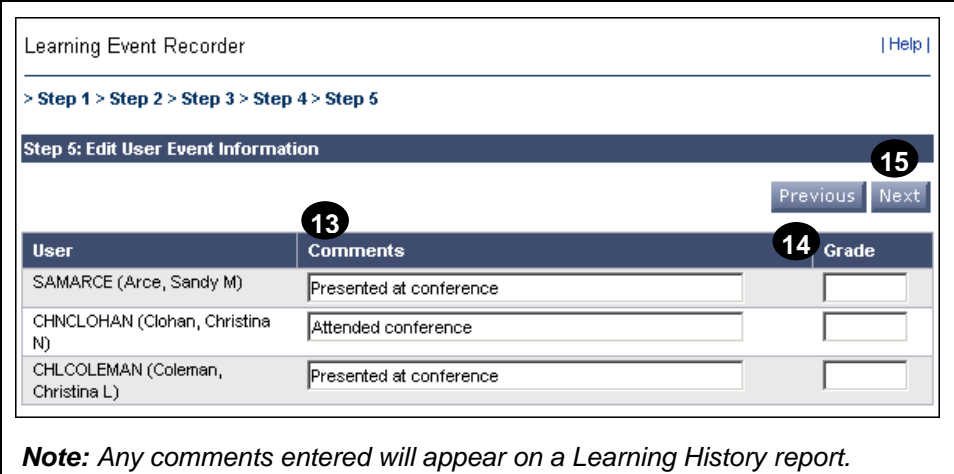
- 5 Click **Next**.



- 6 Fill in all of the required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.

- 7 Click **Next**.



<p>Step 4: Select Users of the Learning Event Recorder wizard displays.</p> <p>8 Enter a User ID exactly.</p> <p>9 Click Add.</p> <p>or</p> <p>10 Click the add one or more from list link to search for and select one or more users.</p>	
<p>11 Once all users have been added, confirm list.</p> <p>12 Click Next.</p>	
<p>Step 5: Edit User Event Information of the Learning Event Recorder wizard displays.</p> <p>13 Enter comments (optional).</p> <p>14 Enter or adjust grade (optional).</p> <p>15 Click Next.</p>	 <p>Note: Any comments entered will appear on a Learning History report.</p>

16 *Step 6: Edit User Event Financial Information of the Learning Event Recorder wizard displays.*

Enter any relevant financial information about the learning event.

Note: If there is no financial information to enter click **Next** to proceed.

17 Click **Next**.

Note: If you enter a price, you must also enter a cost center account code in order to proceed.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5** > **Step 6**

Step 6: Edit User Event Financial Information **17**

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For each User you may either enter the Price and Cost and Profit Centers or you may enter an order ticket.

User	Price (\$) (00.00) 16	Cost Center Account Codes
SAMARCE (Arce, Sandy M)	<input type="text"/>	<input type="text"/>
		Edit
CHNCLOHAN (Clohan, Christina N)	<input type="text"/>	<input type="text"/>
		Edit
CHLCOLEMAN (Coleman, Christina L)	<input type="text"/>	<input type="text"/>
		Edit

Step 7: Record Event of the Learning Event Recorder wizard displays.

18 Review learning event information.

19 Click **Finish**.

Step 7: Record Event **19**

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External Event: Workplace Safety Conference and Expo

Instructor:

Completion Date: 7/25/2007 04:08 PM America/New York Total Hours: 24.00


Contact Hours: **18** CPE: 24.00 Credit Hours:

User	Grade	Comments	Cost Centers	Price (\$)
SAMARCE (Arce, Sandy M)		Presented at conference		
CHNCLOHAN (Clohan, Christina N)		Attended conference		
CHLCOLEMAN (Coleman, Christina L)		Presented at conference		

A pop-up may appear requesting that the page refresh before you proceed.

20 Click **OK**.

Microsoft Internet Explorer

 This action may take more than a few seconds. Please wait for the page to be refreshed.

20 [OK](#)

The application provides a status that the learning event has been recorded successfully.

21 Click **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.

Finished

Status:

- The learning event has been successfully recorded.

21 [Start Over...](#)

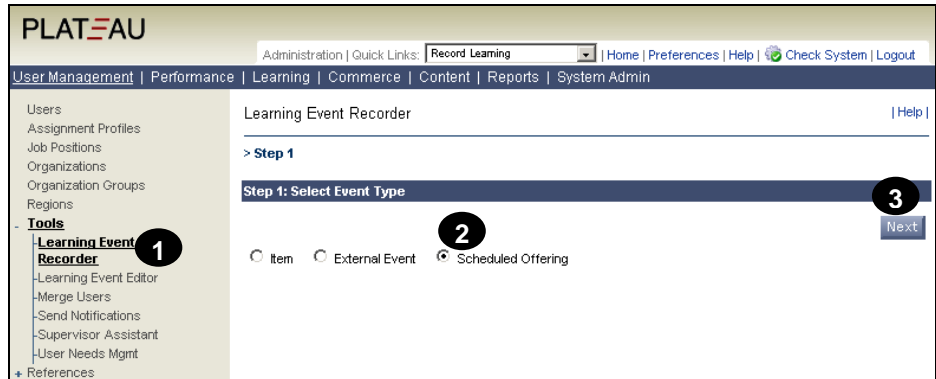
Task C: Use Learning Event Recorder to Record Completion of Scheduled Offering

- 1 Navigate to **User Management > Tools > Learning Event Recorder**.

Step 1: Select Event Type of the Learning Event Recorder wizard displays.

- 2 Select the **Scheduled Offering** option.

- 3 Click **Next**.




Note: This option is usually used to record completion or attendance for scheduled event.

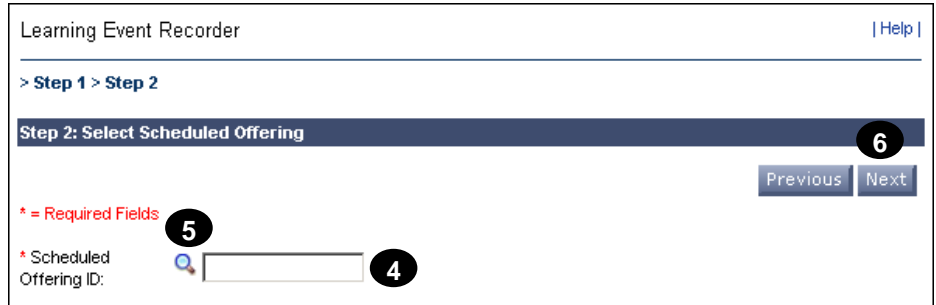
Step 2: Select Scheduled Offering of the Learning Event Recorder wizard displays.

- 4 Enter the Scheduled Offering ID in the textbox exactly.

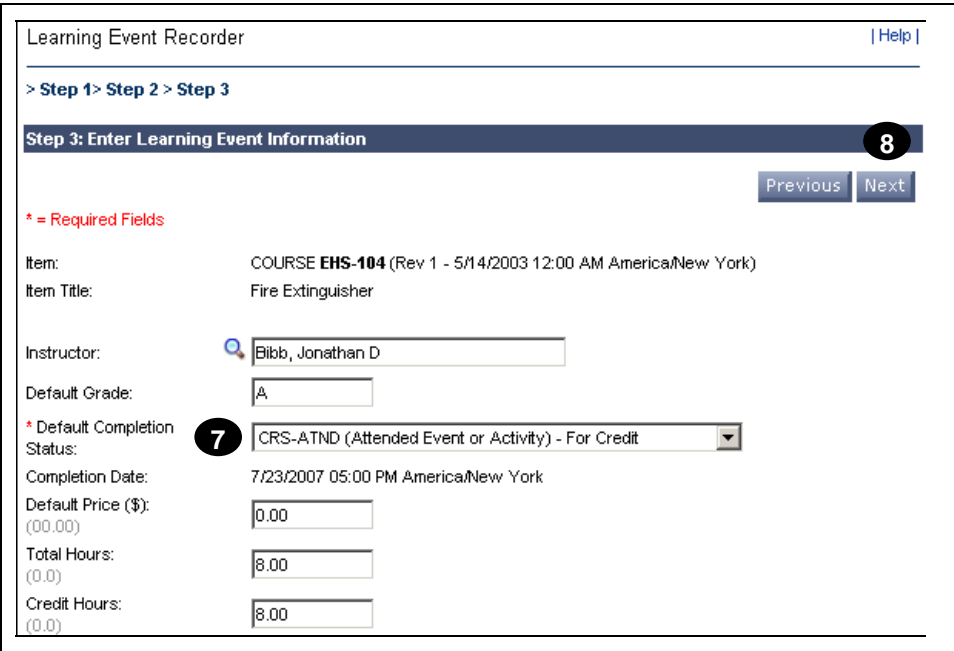
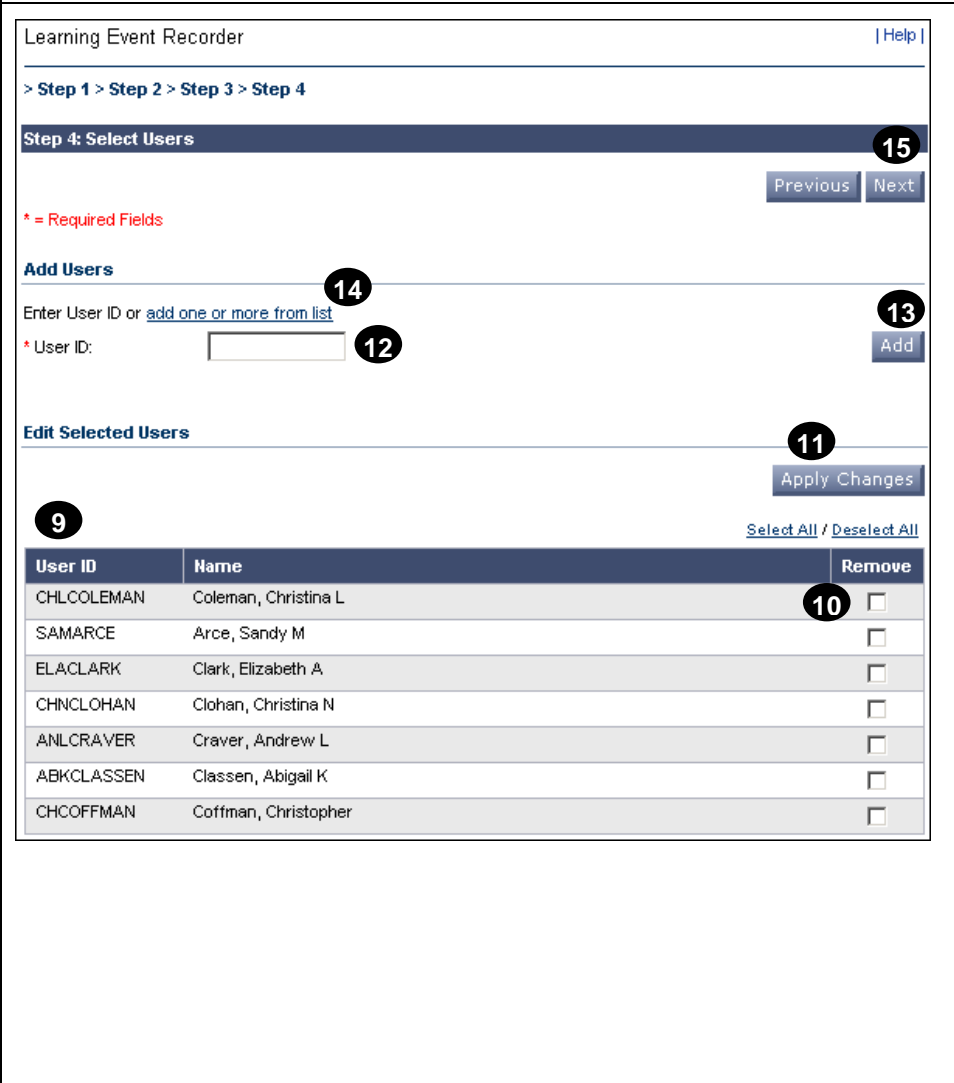
or

- 5 Click the **select icon** () to search for scheduled offering.

- 6 Click **Next**.



Note: If you search for a scheduled offering, the search screen defaults to search for all offerings prior to today's date.

<p>7 Fill in all of the required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.</p> <p>8 Click Next.</p>	
<p>9 Review list of selected users. This list is comprised of all users already registered into the scheduled offering. You can either remove or add users from this list.</p> <p>10 To remove a user, check the Remove checkbox.</p> <p>11 Click Apply Changes.</p> <p>12 To add users, enter a User ID exactly.</p> <p>13 Click Add.</p> <p>or</p> <p>14 Click the add one or more from list link to search for and select one or more users.</p> <p>15 Click Next.</p>	

Step 5: Edit User Event Information of the Learning Event Recorder wizard displays.

- 16** Select an option in the drop-down menu to adjust a user's status.
- 17** Enter comments (optional).
- 18** Enter or adjust grade (optional).
- 19** Click **Next**.

Learning Event Recorder [| Help |](#)

> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5**

Step 5: Edit User Event Information **19**

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User	Comments	Grade	Status
CHLCOLEMAN (Coleman, Christina L)	Did not pay atte	F	CRS-FAIL (Failed Course) - Not For Credit
SAMARCE (Arce, Sandy M)		A	CRS-ATND (Attended Event or Activity) - For Credit
ELACLARK (Clark, Elizabeth A)		A	CRS-ATND (Attended Event or Activity) - For Credit
CHNCLOHAN (Clohan, Christina N)		A	CRS-ATND (Attended Event or Activity) - For Credit
ANLCRAVER (Craver, Andrew L)		A	CRS-ATND (Attended Event or Activity) - For Credit
ABKCLASSEN (Classen, Abigail K)		A	CRS-ATND (Attended Event or Activity) - For Credit
CHCOFFMAN (Coffman, Christopher)		A	CRS-ATND (Attended Event or Activity) - For Credit

Note: Any comments entered will appear on a Learning History report.

Step 6: Edit User Event Financial Information of the Learning Event Recorder wizard displays.

- 20** Enter any relevant financial information about the learning event.
- Note:** If there is no financial information to enter click **Next** to proceed.
- 21** Click **Next**.
- Note:** If you enter a price, you must also enter a cost center account code in order to proceed.

Learning Event Recorder [| Help |](#)



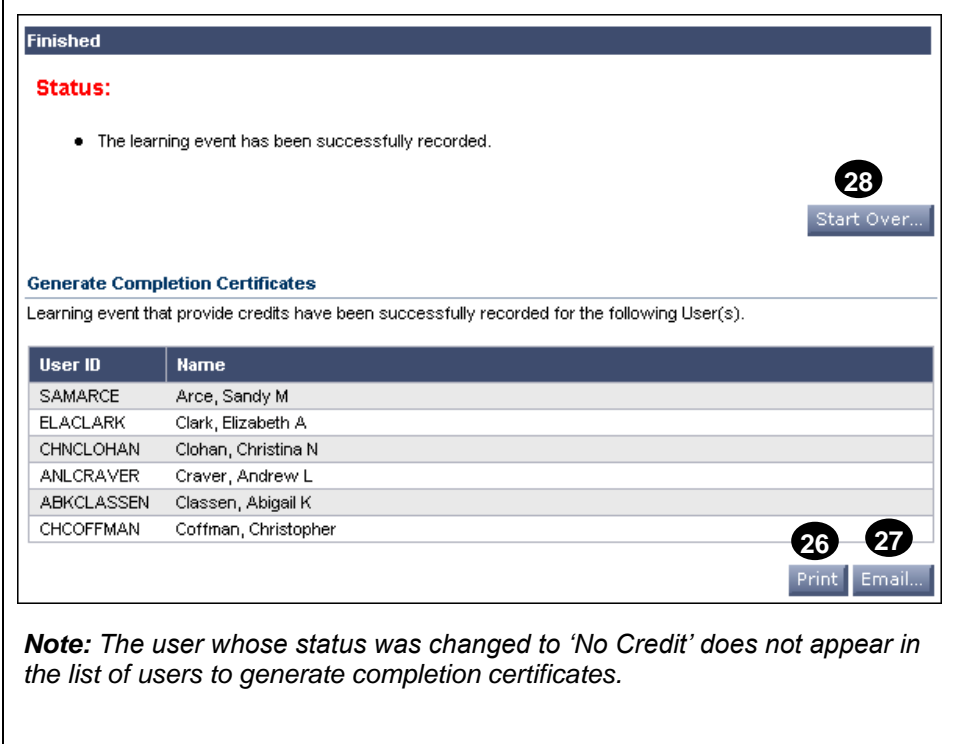
> **Step 1** > **Step 2** > **Step 3** > **Step 4** > **Step 5** > **Step 6**

Step 6: Edit User Event Financial Information **21**

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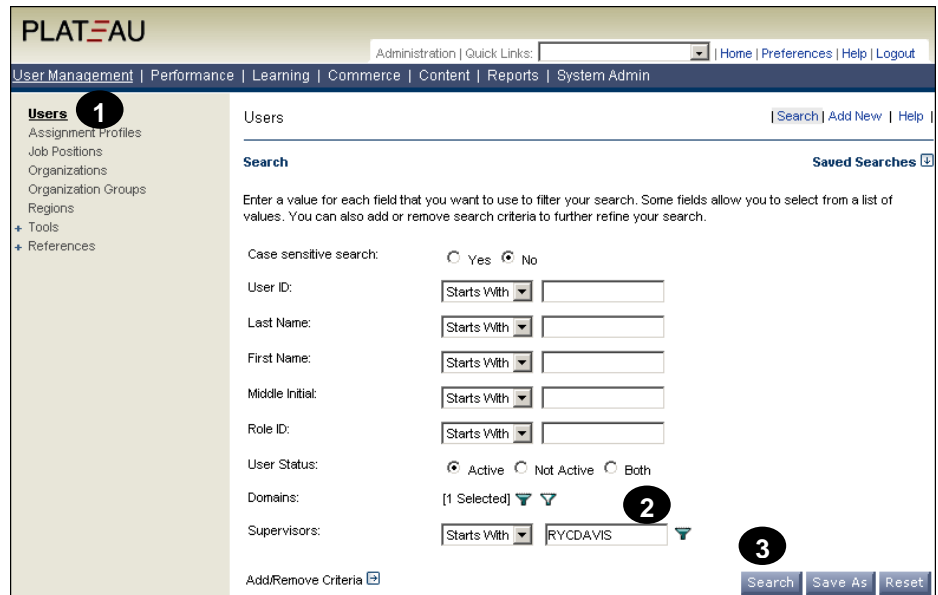
For each User you may either enter the Price and Cost and Profit Centers or you may enter an order ticket.

User	Price (\$) (00.00)	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
CHLCOLEMAN (Coleman, Christina L)	0.00			
SAMARCE (Arce, Sandy M)	0.00			
ELACLARK (Clark, Elizabeth A)	0.00			
CHNCLOHAN (Clohan, Christina N)	0.00			
ANLCRAVER (Craver, Andrew L)	0.00			
ABKCLASSEN (Classen, Abigail K)	0.00			

<p>Step 7: Record Event of the Learning Event Recorder wizard displays.</p> <p>22 If competencies need to be assessed as a result of recording the learning event, select the Automatically Assess Related Competencies checkbox.</p> <p>23 Review learning event information.</p> <p>24 Click Finish.</p>	
<p>A pop-up may appear requesting that the page refresh before you proceed.</p> <p>25 Click OK.</p>	
<p>The application provides a status to let you know that the learning event has been recorded successfully.</p> <p>26 Click Print to print a completion certificate report for each user listed.</p> <p>27 Click Email... to email a completion certificate report to each user listed.</p> <p>28 Click Start Over... to begin the Learning Event Recorder process again. This retains all users previously selected.</p>	 <p>Note: The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.</p>

Task D: View User Learning History tab

- 1 Navigate to **User Management > Users**.
- 2 Enter search criteria to find one of the users for whom you just recorded a completion.
- 3 Click **Search**.



PLATEAU Administration | Quick Links: [dropdown] | Home | Preferences | Help | Logout

User Management | Performance | Learning | Commerce | Content | Reports | System Admin

Users 1

Assignment Profiles
 Job Positions
 Organizations
 Organization Groups
 Regions
 + Tools
 + References

Users [Search] Add New | Help |

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: ☐ Yes ☒ No

User ID: Starts With [dropdown] [text box]

Last Name: Starts With [dropdown] [text box]

First Name: Starts With [dropdown] [text box]

Middle Initial: Starts With [dropdown] [text box]

Role ID: Starts With [dropdown] [text box]

User Status: ☒ Active ☐ Not Active ☐ Both

Domains: [1 Selected] [dropdown] 2

Supervisors: Starts With [dropdown] RYCDAVIS 3

Add/Remove Criteria [icon]

Search Save As Reset

- 4 Click the **edit icon** (edit icon) to select the user record.

Field Chooser [icon]

Send Notification

Select All / Deselect All

User ID	4	User Name	Notify
SAMARCE	[edit icon]	Arce, Sandy M	<input type="checkbox"/>
ELACLARK	[edit icon]	Clark, Elizabeth A	<input type="checkbox"/>
ABKCLASSEN	[edit icon]	Classen, Abigail K	<input type="checkbox"/>
CHNCLOHAN	[edit icon]	Clohan, Christina N	<input type="checkbox"/>
CHCOFFMAN	[edit icon]	Coffman, Christopher	<input type="checkbox"/>
CHLCOLEMAN	[edit icon]	Coleman, Christina L	<input type="checkbox"/>
ANLCRAVER	[edit icon]	Craver, Andrew L	<input type="checkbox"/>

- 5 Click the **Learning History** tab.

Users Search | Add New | Help |

> Search > Search Results > Edit Learning History

User ID: SAMARCE
 Name: Arce, Sandy M

Skills Inventory	Organization Ownership	Alternate Job Positions	Performance Review	External Requests	Standard Options
Commerce	Account Code	Catalog Preview	Preferences	Approval Role	Approvals
Cpty Profiles	Competencies	Registration	Requests	Online Status	Assessments
Summary	Phone Numbers	Custom Fields	Learning Plan	5 Learning History	Curricula

6 Click the **View Details** link for additional information on the learning event. A separate pop-up window appears.

View the Learning History for the User			
			Sort By: Item
Item Title	Status	Completion Date	Details
COURSE EHS-101 (Rev 1.2 - 5/14/2003 12:00 AM America/New York) Emergency Planning	No Show	7/25/2007 03:17 PM America/New York	View Details
COURSE EHS-104 (Rev 1 - 5/14/2003 12:00 AM America/New York) Fire Extinguisher	Attended Event or Activity	7/23/2007 05:00 PM America/New York	View Details
COURSE EHS-106 (Rev 1.2 - 5/14/2003 12:00 AM America/New York) Fire Safety	Attended Event or Activity	4/14/2003 04:00 PM America/New York	View Details
COURSE HR-100 (Rev 1.2 - 5/14/2003 12:00 AM America/New York) New Employee Orientation	Passed Course	12/1/2003 01:21 PM America/New York	View Details
		7/25/2007 04:08 PM America/New York	View Details
Workplace Safety Conference and Expo			

7 The Learning History Details page will display specific details about the event, including any comments entered when the event was recorded.

7 Click **Close** to return to the user record.

Learning History Details	
Item:	COURSE EHS-101 (Rev 1.2 - 5/14/2003 12:00 AM America/New York)
Title:	Emergency Planning
Scheduled Offering ID:	
Instructor:	Almeida, Luana D
Completion Date:	7/25/2007 03:17 PM America/New York
Completion Status:	CRS-NS (No Show)
Total Hours:	Contact Hours:
CPE Hours: 3.00	Credit Hours: 8.00
Percentage Grade:	
Comments:	Sandy did not show up for class.
7 Close	

Notes